**Family Interpersonal Assessment**

As your family’s Communication Skills Specialist, I am just getting to know your family. It often helps me if I get some ideas from you ahead of time. Feel free to write in the margins and add your own comments; those are usually the most helpful. Otherwise, the following questions may help guide you in your responses.

1. What is the most important thing you could accomplish by being in this collaborative process with your family members?

1. What are some of your major concerns as you begin the process?

1. What are your financial goals related to the estate?

1. What do you see as challenges or barriers to reaching those goals?

1. In your opinion, what family history is important for me to know? (Particular traumas, losses, moves, illnesses, divorce, etc.)

1. How do you think this might affect the process?

1. What current situation (health, financial well-being) do you think is most important to consider?

1. What do you most want for your family from this process?

1. What other concerns or information do you think would be important for me to know in beginning this process?

Thank you for taking the time to answer these questions. I look forward to working with you and your family.

Sincerely,

Nancy J. Ross, LCSW, BCD